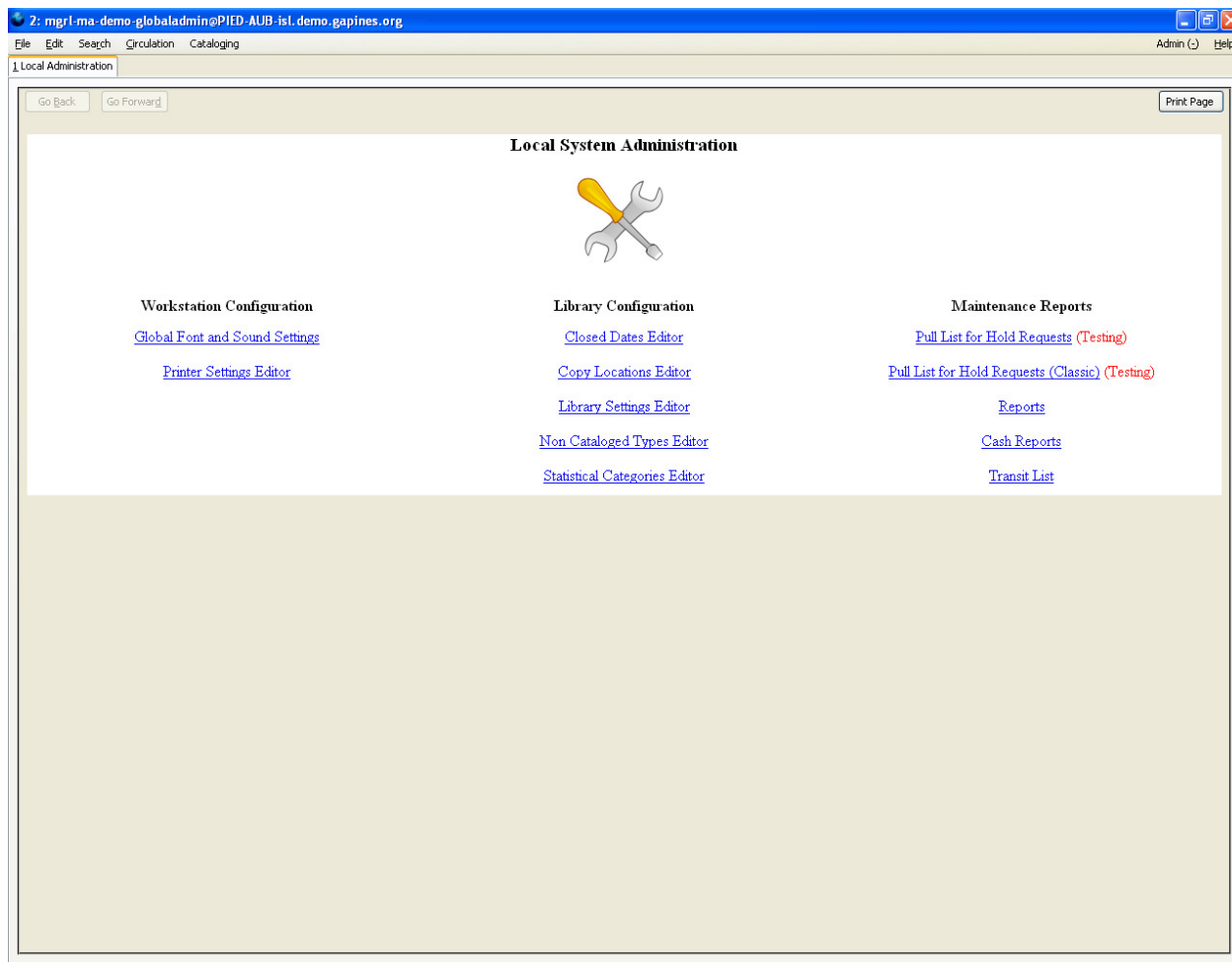




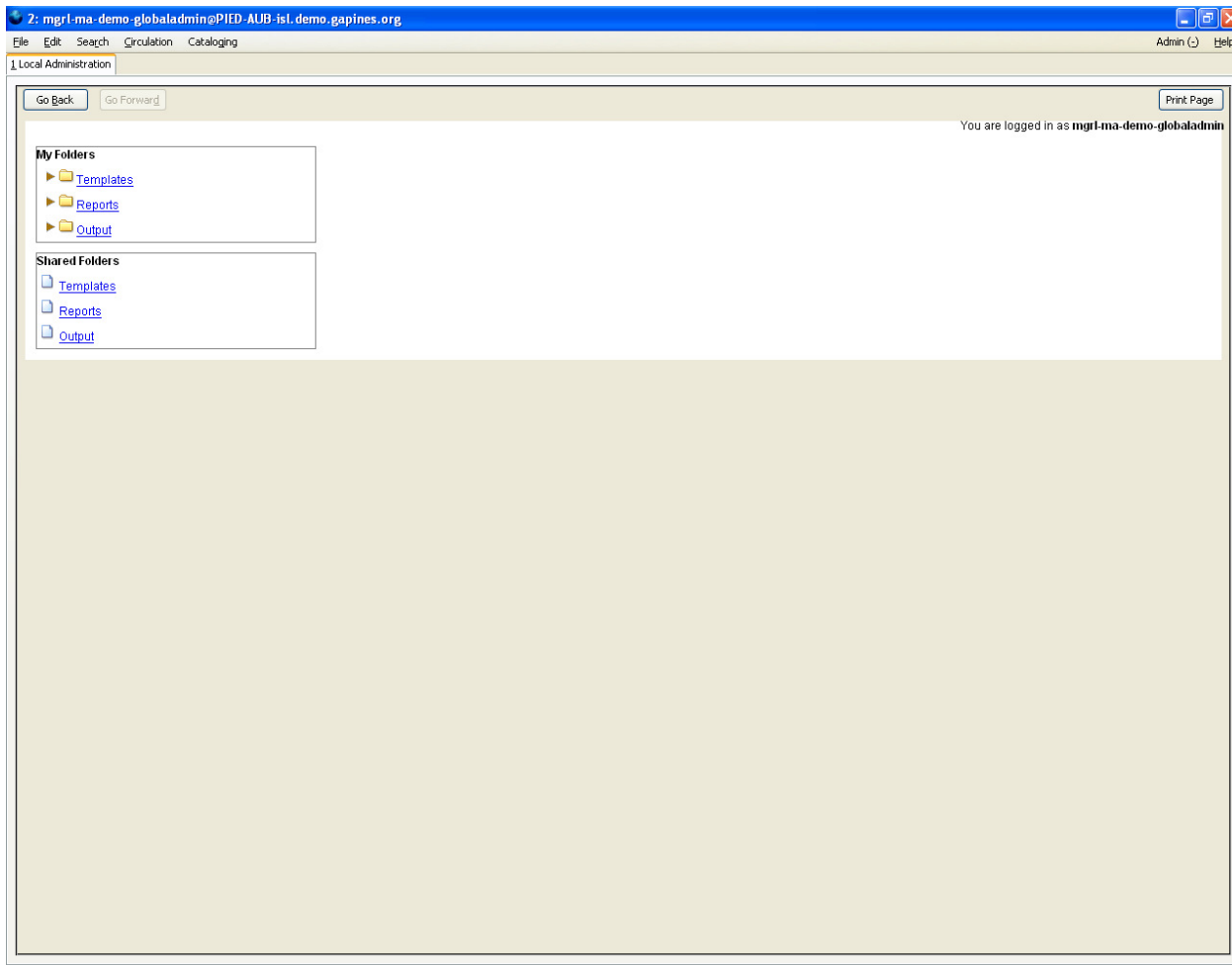
## Creating Report Templates

Local administrators are able to create and share (if desired) reporting templates. The reporting window can be accessed from the “Admin (.)” button in the upper-right corner of the screen.

From “Local System Administration” click “Reports”.



The Reporting screen will look blank the first time you access it, but we will use the following steps to populate this page with your report templates and archived outputs.



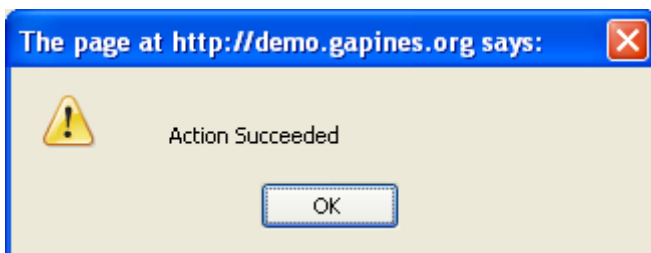
Begin by clicking on “Templates” under **My Folders** to create a sub folder to store your libraries templates. If you have multiple admins who prefer their own style of template, you also could create subfolders for them.

The screenshot shows a web browser window with the address bar displaying '2: mgri-ma-demo-globaladmin@PIED-AUB-ist-demo.gapines.org'. The browser's menu bar includes 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Admin (C)', and 'Help'. Below the menu bar is a 'Local Administration' tab. The main content area has a header with 'Go Back', 'Go Forward', and 'Print Page' buttons. On the left, there are two panels: 'My Folders' and 'Shared Folders'. Both panels list 'Templates', 'Reports', and 'Output' as clickable links. The 'My Folders' panel is active, showing a 'Create a new sub-folder' form. The form has a title 'Create a new sub-folder. Folder type: Template'. It contains three input fields: 'Folder Name:' (a text box), 'Share this folder:' (a dropdown menu set to 'Do not share'), and 'Share with:' (a dropdown menu set to 'Auburn Public Library'). A 'Create Sub Folder' button is located at the bottom right of the form. The background of the main content area is a large, empty, light beige rectangle.

It is also possible to share your templates with other libraries in your system or share them consortium wide. This is achieved by selecting “Share” from the “Share this folder:” dropdown menu and choosing the preferred group to share with from the “Share with:” dropdown as shown on the following page.

The screenshot shows a web browser window with the address bar displaying `2: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org`. The browser has a menu bar with `File`, `Edit`, `Search`, `Circulation`, and `Cataloging`, and a status bar with `Admin (.)` and `Help`. The main content area is titled `Local Administration` and includes a `Print Page` button. On the left, there are two panels: **My Folders** with links to `Templates`, `Reports`, and `Output`; and **Shared Folders** with the same links. The main area displays a **Create a new sub-folder** dialog with the following fields:   
- **Folder Name:** `Union County Public Libr`  
- **Share this folder:** `Do not share` (dropdown)  
- **Share with:** `Auburn Public Library` (dropdown menu with options: `Auburn Public Library`, `PINES Consortium`, `Victory Regional Library System`, and `Auburn Public Library` selected).  
The dialog also shows a `Go Back` button and a `Go Forward` button. The status bar at the bottom indicates `You are logged in as mgrl-ma-demo-globaladmin`.

After you have named the folder and chosen any sharing options click “Create Sub Folder” to finish. The “Action Succeeded” dialog will appear confirming the creation was successful.

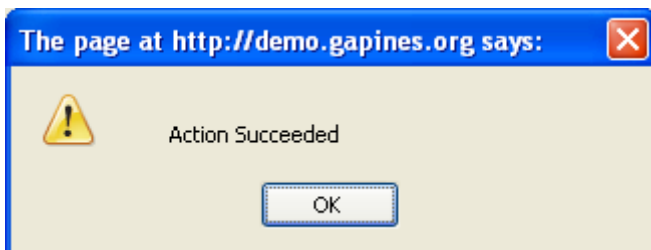


Next we will create subfolders for reports. Click “Reports” under **My Folders** to create a sub folder to store your libraries reports.

Again, give the folder a name and chose your sharing preferences.

The screenshot shows a web browser window with the address bar displaying '2: mgri-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org'. The browser's menu bar includes 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Admin', and 'Help'. The main content area is titled 'Local Administration' and features a 'Go Back' and 'Go Forward' navigation bar. On the left, there are two panels: 'My Folders' and 'Shared Folders'. The 'My Folders' panel lists 'Templates', 'Reports', and 'Output'. The 'Shared Folders' panel lists 'Templates', 'Reports', and 'Output'. The 'Reports' folder is selected. A 'Create a new sub-folder' dialog box is open, titled 'Folder type: Report'. It contains the following fields: 'Folder Name' (Union County Public Libr), 'Share this folder' (Do not share), and 'Share with' (Auburn Public Library). A 'Create Sub Folder' button is at the bottom right of the dialog. The background of the main content area is a large, empty, light beige rectangle.

After you have named the folder and chosen any sharing options click “Create Sub Folder” to finish. The “Action Succeeded” dialog will appear confirming the creation was successful.



Finally, we will create subfolder for the report outputs. Click “Output” under **My Folders** to create a sub folder to store your libraries reports.

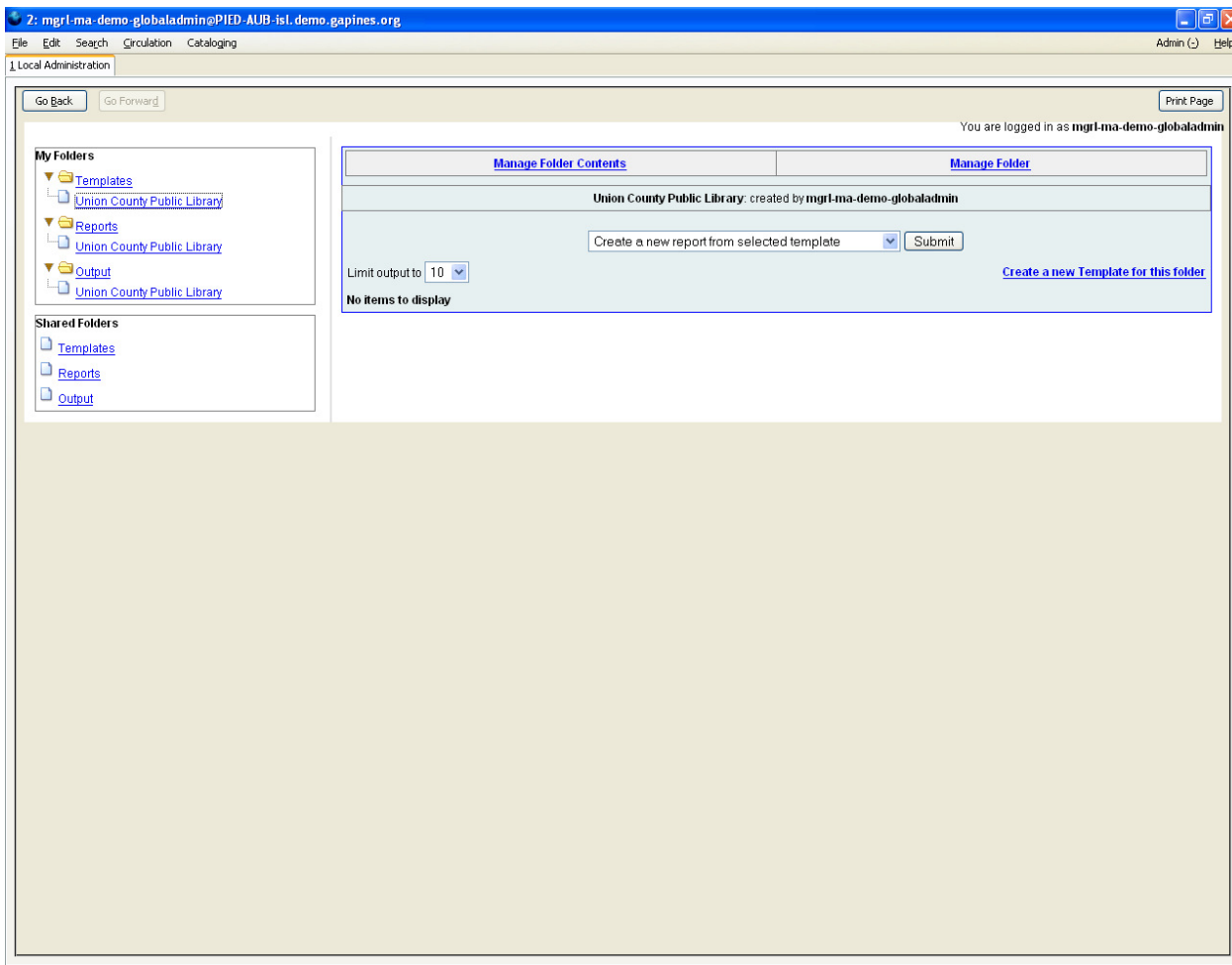
The screenshot shows a web browser window with the address bar displaying '2: mgri-ma-demo-globaladmin@PIED-AUB-ist.demo.gapines.org'. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Admin (C)', and 'Help'. Below the menu bar is a 'Local Administration' tab. The main content area is titled 'You are logged in as mgri-ma-demo-globaladmin'. On the left, there are two sections: 'My Folders' and 'Shared Folders'. 'My Folders' contains a tree view with 'Templates', 'Reports', 'Union County Public Library', and 'Output'. 'Shared Folders' contains 'Templates', 'Reports', and 'Output'. The 'Output' folder under 'My Folders' is selected. On the right, there is a form titled 'Create a new sub-folder. Folder type: Output'. The form has three fields: 'Folder Name' with the value 'Union County Public Libr', 'Share this folder:' with a dropdown menu set to 'Do not share', and 'Share with:' with a dropdown menu set to 'Auburn Public Library'. There is a 'Create Sub Folder' button at the bottom of the form.

Now, by clicking on the brown arrows under **My Folders** you will see the subfolders you have created for your library.

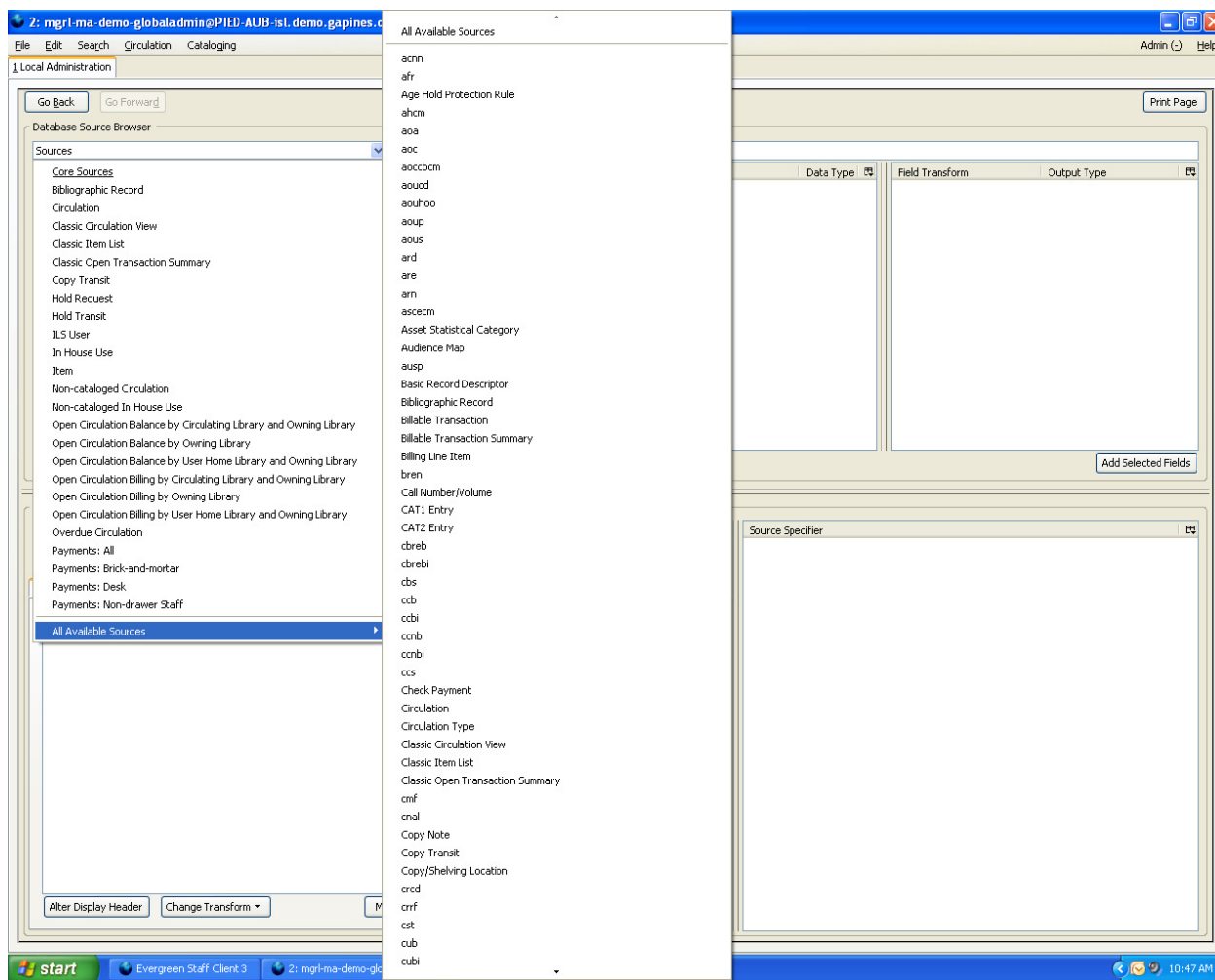
The following pages will document the process to create report templates and create, run and review reports based on those templates.

From the **My Folders** pane, click on the folder corresponding to the desired location for the template to be saved. In this case, *Union County Public Library*.

The window below will appear. To create a new template click the link for [Create a new Template for this folder.](#)



The following window allows administrators to pick what sources in the database to build their reports from. Items such as item age, title, barcode, patron barcode, last checkout date/time, total circulations, etc. can be chosen as Displayed Fields in reports.



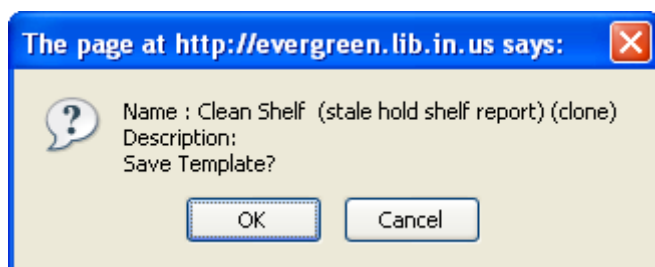


For the case of this tutorial, we will create a report to help circulation staff clean the holds shelf of items which have not been picked up after 14 days.

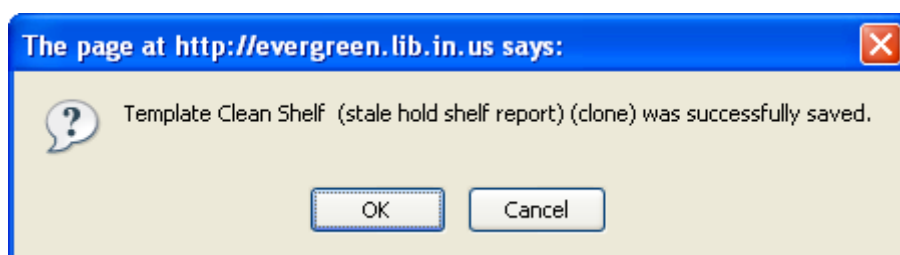
Select “Hold Request” from dropdown then double click +Item from below. Several Field Names will appear in the middle pane. Double click the desired Field Name, in this case, “Pickup Library” or click “Add Selected Fields”.

Continue on by adding Capture Date/Time, Customer Barcode, Item Barcode, and Title Proper.

Finally, give this template a descriptive name and a description for later identification, then click “save”.



A confirmation will again appear. Click OK to save the template.



Click the brown arrow next to “Templates” to reveal the Union County Public Library folder we created previously. In the list to the right, you will see the name of the template we have just created.

The screenshot shows a web application interface for managing report templates. On the left, there are two panels: 'My Folders' and 'Shared Folders'. Both panels show a tree structure with 'Templates' expanded, revealing a folder named 'Union County Public Library'. The main content area is titled 'Union County Public Library: created by mgri-ma-demo-globaladmin'. It contains a form to 'Create a new report from selected template' with a dropdown menu and a 'Submit' button. Below this is a table listing report templates.

Select	name	description	create_time	owner
<input type="checkbox"/>	Item, Item Age, Last Checkout, Total Checkouts		2008-09-03 11:13	mgri-ma-demo-globaladmin

To create a report from this template, place a check in the box under “Select” and click “Submit” next to “Create a new report from selected template” in the dropdown. If we wished to create multiple reports, we could do so by selecting one, a few, or all of the templates in the list.

After clicking submit, the Reporting Options screen will appear.

3: admin@HMMPL-isl-mikepeters.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin Help

Local Administration

Go Back Go Forward Print Page

**My Folders**

- Templates
- testing (HMMPL)
- Reports
- testing
- Output

**Shared Folders**

- Templates
- Reports
- Output

**Template Name:** Clean Shelf (stale hold shelf report) (clone)

**Template Creator:** admin

**Template Description:**

**Report Name:** Testing Clean Holds Shelf

**Report Description:** 9.2.2008 Testing Clean Holds Shelf

**Report Columns:**

Pickup Library  
Capture Date/Time  
Customer Barcode  
Item Barcode  
Title Proper (normalized)

Selected Folder: testing

Choose a folder to store this report definition:

Report Folders  
testing

Column	Transform	Action	User Params
Hold Request -> Capture Date/Time	Age	Greater than	1 Day(s)
Hold Request -> Pickup Library	Raw Data	Equals	HMMPL

**Output Options**

- ☒ Excel Output
- ☒ CSV Output
- ☒ HTML Output
  - ☒ Bar Charts
  - ☒ Line Charts

**Recurring Report:** ☐

**Recurrence Interval:** 1 Day(s)

**Run ASAP** ☒ or at: 2008-09-03 at Midnight

**Send completion notification to this Email address:**

Selected Folder:

Output Folders  
testing

Save Report

Give this report a name, such as “Item Age and Last Checkout 9/2/2008”. You can also give the report a description.

Next, chose the folder to store the settings for this report for later reuse. The Union County Public Library “Report Folder” we created earlier appears. Click this and the Selected Folder: will be followed by a bold **Union County Public Library** signifying that this is the selected folder.

If there are any user parameters you will need to set, such as how old of holds you want to prune or what library the hold was requested to be picked up at, you can set that from this screen.

Also, Evergreen Indiana gives administrators the chose of Excel (.xls), CSV (.csv) or HTML (web based) reports. You can select any combination or even all of these report outputs based on your needs and preferences.

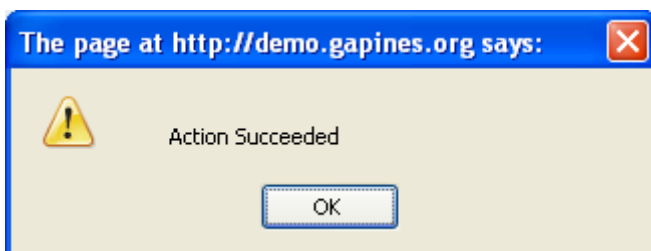
Next, administrators can set the report to recur, and if so how often. Also, you can choose to run the report immediately by checking the box “ASAP” or schedule a time for the report to run. If an email address is provided, Evergreen will dispatch an email to that address stating that report has been completed.

The final step in the reporting process is to select an output folder. This is again done by clicking on the “Output Folder” we created earlier appears. Click this and the Selected Folder: will be followed by a bold **Union County Public Library** signifying that this is the selected folder.

Recurrence Interval:	1 Day(s)
Run ASAP <input type="checkbox"/> or at:	2008-09-03 at Midnight
Send completion notification to this Email address:	<input type="text"/>
Choose a folder to store this report's output:	Selected Folder: <b>Union County Public Library</b> Output Folders Union County Public Library
<input type="button" value="Save Report"/>	

To save and run the report (if ASAP was chosen) click “Save Report”.

The “Action Succeeded” message will appear.



To view the report, click on “Output” under “My Folders”. Place a check in the box next to the reports you wish to view outputs for, in this case “9.2.2008 Testing Clean Holds Shelf”. After selecting the desired report to view, click “Submit”

3: admin@HMPL-isl-mikepeters.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (:) Help

1 Local Administration

Go Back Go Forward Print Page

You are logged in as admin

**My Folders**

- Templates
- Reports
- Output
  - testing

**Shared Folders**

- Templates
- Reports
- Output

[Manage Folder Contents](#) [Manage Folder](#)

testing: created by admin

View report output

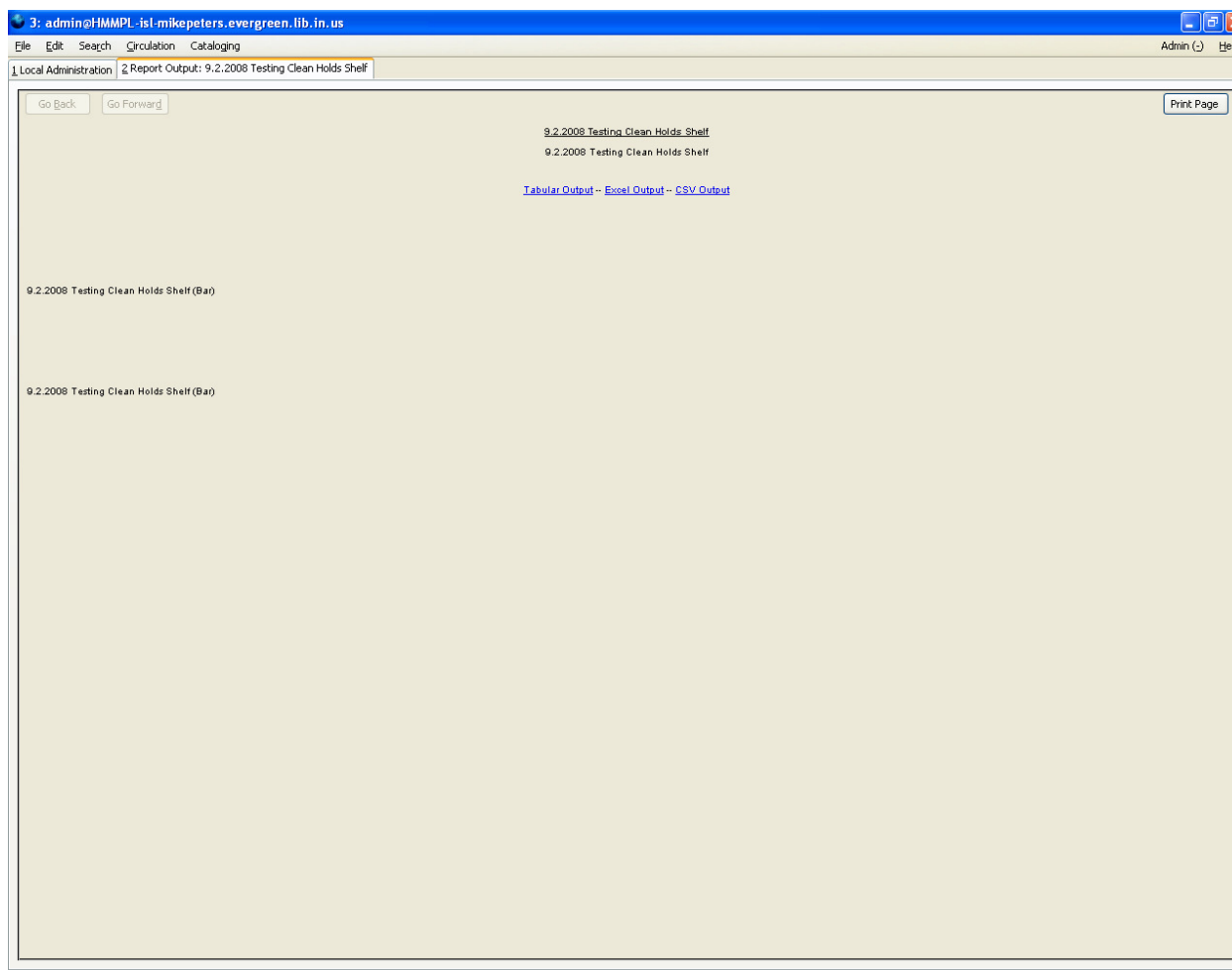
Limit output to 10 Pending Items

No items to display

Limit output to 10 Completed Items

Select	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
<input checked="" type="checkbox"/>	<a href="#">9.2.2008 Testing Clean Holds Shelf</a>	2008-09-03 11:50	2008-09-03 11:51	admin		1		t	t	t
<input type="checkbox"/>	<a href="#">Prune Hold Shelf</a>	2008-09-03 11:40	2008-09-03 11:40	admin		1		t	t	f
<input type="checkbox"/>	<a href="#">Pruning Old Items</a>	2008-09-03 11:39	2008-09-03 11:39	admin		1		t	t	f
<input type="checkbox"/>	<a href="#">Item circ info - 8-27/2008</a>	2008-08-27 15:56	2008-08-27 15:56	admin	mrylander@gmail.com	1		t	t	f
<input type="checkbox"/>	<a href="#">7-day hold shelf report</a>	2008-08-27 15:39	2008-08-27 15:39	admin	mrylander@gmail.com	1		f	t	f

The selected reporting outputs will appear.



You can click Excel and CSV to save those respective files to your local hard drive for editing/viewing or you can click “Tabular Output” to view and print the output in HTML format, as shown on the next page.

3: admin@HMPL-ist-mikepeters.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin ( ) Help

1 Local Administration 2 Report Output: 9.2.2008 Testing Clean Holds Shelf

Go Back Go Forward Print Page

Pickup Library	Capture Date/Time	Customer Barcode	Item Barcode	Title Proper (normalized)
HMPL	2002-12-10 00:00:00	23946000036456	33946000883020	roverandom
HMPL	2003-01-03 00:00:00	23946000036456	33946001303051	the a.b.c. murders
HMPL	2003-04-10 00:00:00	23946000036456	33946001025921	wise blood
HMPL	2003-04-11 00:00:00	23946000036456	33946000032891	bride of pandemonium
HMPL	2003-05-20 00:00:00	23946000036456	33946000911763	breakfast of champions
HMPL	2003-08-14 00:00:00	23946000036456	33946001316020	the waterboy
HMPL	2003-09-03 00:00:00	23946000036456	33946001232912	blood and gold, or, the story of marius
HMPL	2003-09-09 00:00:00	23946000036456	33946000579339	the runaway jury
HMPL	2004-05-07 00:00:00	23946000140282	33946001454680	catch me if you can
HMPL	2006-03-31 00:00:00	23946000207792	33946001380679	mighty adventurer of the planet
HMPL	2008-01-07 00:00:00	23946000233640	33946000984006	public ports for indiana
HMPL	2008-04-30 00:00:00	LIBCIRCUSE	33946001593107	fox in socks, horton hatches the egg and other stories
HMPL	2008-06-19 00:00:00	23946000214228	33946000735560	basket #79
HMPL	2008-06-20 00:00:00	23946000223831	33946000009709	jumanji
HMPL	2008-06-25 00:00:00	23946000204237	33946001845622	the secrets of peaches
HMPL	2008-06-28 00:00:00	23946000252746	33946001961346	down river
HMPL	2008-06-29 00:00:00	23946000162898	33946000825682	when jessie came across the sea
HMPL	2008-07-07 00:00:00	23946000044823	33946000058805	interview with the vampire
HMPL	2008-07-07 00:00:00	23946000128600	33946002038342	feared fourteen
HMPL	2008-07-07 00:00:00	23946000131893	33946001962739	the final warning
HMPL	2008-07-08 00:00:00	23946000217296	33946001970461	twilight
HMPL	2008-07-08 00:00:00	23946000254059	33946001669433	flush
HMPL	2008-07-11 00:00:00	23946000177367	33946001940685	twilight
HMPL	2008-07-11 00:00:00	23946000177367	33946002005960	the host
HMPL	2008-07-12 00:00:00	23946000191749	33946002037906	feared fourteen
HMPL	2008-07-12 00:00:00	23946000255049	33946001106975	the horse and his boy
HMPL	2008-07-14 00:00:00	23946000230315	33946001747828	twilight
HMPL	2008-07-15 00:00:00	23946000215563	33946001579346	something borrowed
HMPL	2008-07-16 00:00:00	23946000182383	33946002013071	raven rise
HMPL	2008-07-18 00:00:00	23946000232006	33946001448831	get on the ball
HMPL	2008-07-19 00:00:00	23946000014057	33946002035793	the shark
HMPL	2008-07-19 00:00:00	23946000257755	33946002034694	the monster of florence
HMPL	2008-07-22 00:00:00	23946000190642	33946001965351	twenty wishes
HMPL	2008-07-23 00:00:00	23946000102787	33946001807242	dear john
HMPL	2008-07-23 00:00:00	23946000164050	33946001892871	this i believe
HMPL	2008-07-23 00:00:00	23946000227402	33946002039332	monk
HMPL	2008-07-24 00:00:00	23946000188315	33946001385322	private lessons
HMPL	2008-07-24 00:00:00	23946000249653	33946000110762	brideshead revisited
HMPL	2008-07-25 00:00:00	23946000098146	33946002029143	fractured
HMPL	2008-07-26 00:00:00	23946000254059	33946001885208	the invention of hugo cabret
HMPL	2008-07-28 00:00:00	23946000013760	33946002038391	generation me
HMPL	2008-07-28 00:00:00	23946000217825	33946001972764	the amazing spider-man
HMPL	2008-07-29 00:00:00	23946000130382	33946001575419	the city of ember
HMPL	2008-07-30 00:00:00	23946000134624	33946001788954	mercy watson goes for a ride
HMPL	2008-07-30 00:00:00	23946000134624	33946001964803	skippyjon jones in the dog house
HMPL	2008-07-30 00:00:00	23946000192465	33946001973341	final fantasy: unlimited
HMPL	2008-07-31 00:00:00	23946000189446	33946000004809	sammy the seal
HMPL	2008-07-31 00:00:00	23946000247442	33946002039118	the shark
HMPL	2008-08-01 00:00:00	23946000146937	33946001572846	above the veil
HMPL	2008-08-01 00:00:00	23946000233152	33946002040058	artemis fowl
HMPL	2008-08-01 00:00:00	23946000242302	33946001974380	people of the book
HMPL	2008-08-02 00:00:00	23946000118064	33946000731096	the diving bell and the butterfly
HMPL	2008-08-02 00:00:00	23946000242799	33946001911754	love, stargirl

From here, you can print this page, or go back to chose the CSV or XLS reports, if they were created. These can be imported into Excel for further review and editing.